FERMI NATIONAL ACCELERATOR LABORATORY

Fermilab SharePoint 2010

Site Owner Training Manual

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Version 5.0

This training manual provides information and hands-on examples for how to use the Fermilab instance of SharePoint for those with Full Control-level site permissions

Contents

Useful Online Resources

Fermilab Resources:

- Fermilab integration environment: https://intranet-int.fnal.gov/
- Fermilab SharePoint Help Site: https://sharepoint.fnal.gov/help/Pages/HelpHome.aspx
- Fermilab SharePoint Help Blog: https://sharepoint.fnal.gov/help/HelpBlog/default.aspx
- SharePoint books at the Fermilab library*:* *https://sharepoint.fnal.gov/help/Lists/Books%20About%20SharePoint%202010/AllItems.aspx*
- Latest version of the Site Owner training manual*:* *https://sharepoint.fnal.gov/cd/sites/com/SharePointCOM/Training%20Manuals/Fermilab%20SharePoint%202010%20Site%20Owner%20Training%20Manual.docx*

Online training from Microsoft:

- Microsoft SharePoint 2010 training: http://office.microsoft.com/serverhelp/helpcategory14.aspx?CategoryID=CH010372432&lcid=1033&products=WSSENDUSER&CTT=4

Online resources from Microsoft:

- Microsoft SharePoint 2010 | For End Users: http://sharepoint.microsoft.com/en-us/product/benefits/End-User/Pages/default.aspx
- Microsoft "That's why I use SharePoint" site: http://sharepoint.microsoft.com/iusesharepoint/landing.aspx
- Microsoft SharePoint 2010 Quick Reference Cards: http://download.microsoft.com/download/d/4/2/d4290c8a-5563-44a7-96a6-9fe77eff40b0/qrc_all.pdf

References

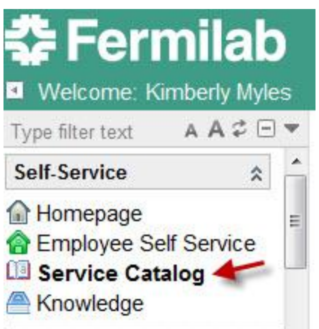
1. Microsoft SharePoint 2010 Plain & Simple, by Jonathan Lightfoot and Chris Beckett.
2. SharePoint 2010 How-To, by Ishai Sagi.
3. Microsoft SharePoint 2010 for Dummies, by Vanessa L. Williams.
4. The SharePoint Shepherd's Guide for End Users, by Robert L. Bogue.
5. Beginning SharePoint 2010: Building Business Solutions with SharePoint, by Amanda Perran, Shane Perran, Jennifer Mason, and Laura Rogers.

Additional training opportunities

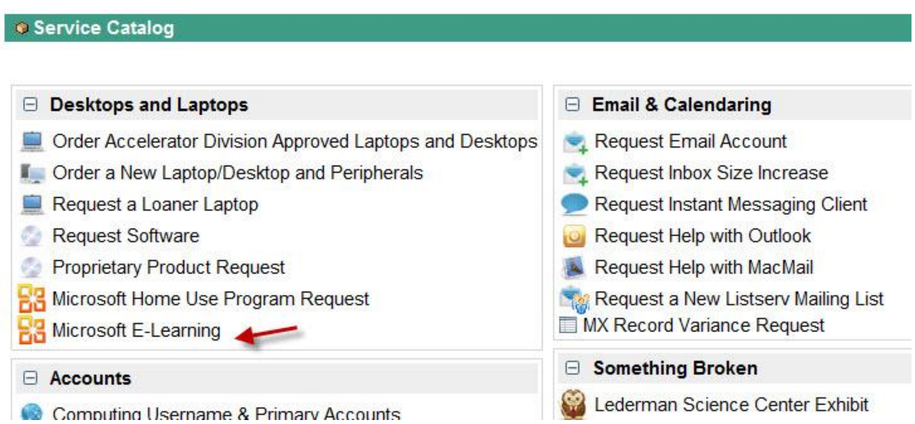
SharePoint computer-based training for Employees

Fermilab employees can request online, Computer-based SharePoint training through the Fermilab Service Desk:

1. Login to the Service Desk. From the "Self-Service" area, select "Service Catalog".



2. From the "Desktops and Laptops" area, select "Microsoft E-Learning"



3. A page appears providing more detail on how to register and a link to what courses are available.

Learning Tree

Learning Tree offers a series of SharePoint classes suitable for all levels of users.

List of SharePoint classes offered by learning tree:

http://www.learningtree.com/training-directory/sharepoint-training-6.htm

Please consult your manager or supervisor to determine if you can attend one of these classes.

Introduction

This user guide seeks to highlight best practices and suggestions for the actions you can take to maintain your site as a Site Administrator or Site Owner.

Each SharePoint site (top-level) has one or more site administrators assigned to it. The site administrator's responsibilities include granting access to the site, creating lists and libraries, adding additional sites called "sub-sites", and applying security settings.

1. Authentication

1.1 Login to SharePoint

You can use the following web browsers with SharePoint:

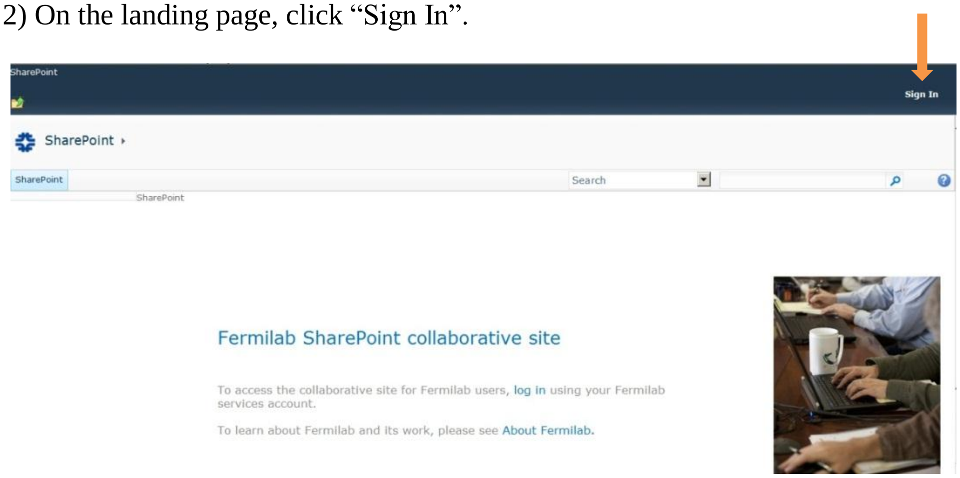
- Internet Explorer
- Mozilla Firefox
- Google Chrome
- Safari

To avoid compatibility issues, start SharePoint in a 32- bit browser. For more detailed information regarding supported browsers, please visit: http://technet.microsoft.com/en-us/library/cc263526.aspx

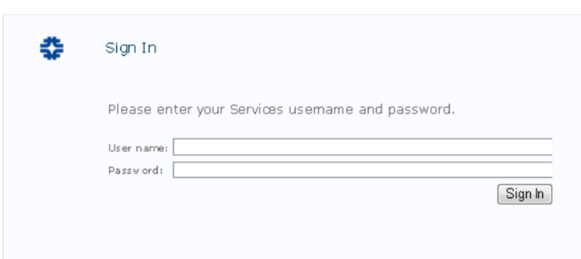
To login to SharePoint:

1) Navigate to: https://sharepoint.fnal.gov/

2) On the landing page, click "Sign In".



2) Enter your Services Account username and password.



SharePoint tips

- SilverLight is an application that enables multimedia, graphics and animation to run on SharePoint.
- You can check to make sure the SilverLight player is installed on your system from the following Microsoft site:

http://www.microsoft.com/getsilverlight/Get-Started/Install/Default.aspx

- For PC users: Silverlight is normally installed by default.
- For Mac users: you may need to download and install the player from the Microsoft site above.

2. Site Collections

Every SharePoint site is a member of a site collection and a site collection is simply a collection of sites. Every site collection has a single root site. Other sites, called sub-sites, can be built under the root site. A site collection has some attributes that are common to all sites in a collection, such as shared permissions, galleries for templates and content types.

A site can house more than just pages. A SharePoint site is a container that can hold Lists and Libraries, and other “sub-sites” and pages beneath it.

Note: Only SharePoint systems administrator(s) can create site collections.

2.1 Request a new site collection

To request a new site collection at Fermilab:

1. Login to Service-Now: https://fermi.service-now.com/
2. From the Employee Self Service page in the “Request Things” area, select “Get help with Web & Collaboration Sites”.
3. Select “Request a SharePoint Site Collection”.
4. In the “Request a new SharePoint Site Collection” form that appears, fill out all required fields and click “Order Now”.

2.2 View site administrator(s) for a site collection

To view a list of site administrators for site collections at Fermilab:

1. Click “Site list” from the top menu on the main SharePoint landing page: sharepoint.fnal.gov
2. Click “list of sites” (the title)
3. Select the List tab from the tools menu.
4. Conduct a site search by using your “Command” and “F” key for a Mac or “CTRL” and “F” key for PC and entering search criteria.
5. Tick the box in front of the site you want to view and select “View Item” from the ribbon.

TIP: If you would like to condense the site list, under “current view”, select “Display view” to change the view.

3. Working with team sites

The standard SharePoint site for departments, groups and any other organization at Fermilab is a team site. A team site is simply a collection of "wiki" web pages .Wikis derive their name from the Hawaiian word for "quick". SharePoint wikis are designed to make it easy to publish content. Wiki pages contain rich content, such as text, tables, links, and images.

By default, team sites have a shared document library, lists (including a calendar and tasks), and a team discussion board. Site Owners can also add Web Parts to their team sites. (See Chapter 5.3 and 5.4 of the Fermilab SharePoint 2010 End-user training manual for more on working with Web parts)

3.1 Create a My Site Team Site for production testing purposes

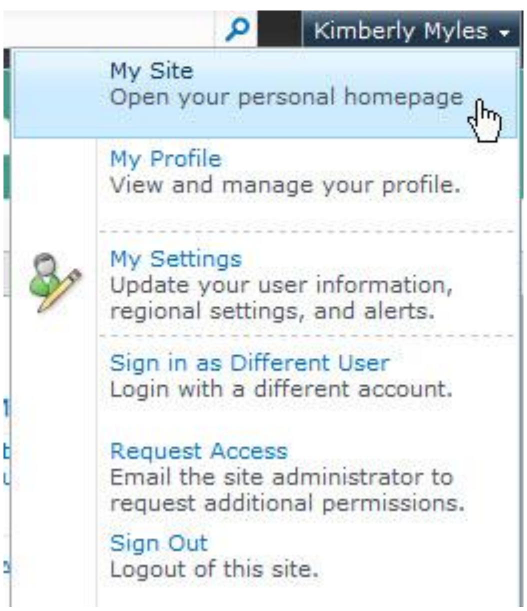
Anyone with a Services Account and password can create a My Site team site sub-site for use as a production sandbox to test basic SharePoint features covered in training.

NOTE: For more complex testing, please test in the integration environment: https://intranet-int.fnal.gov/Pages/Default.aspx

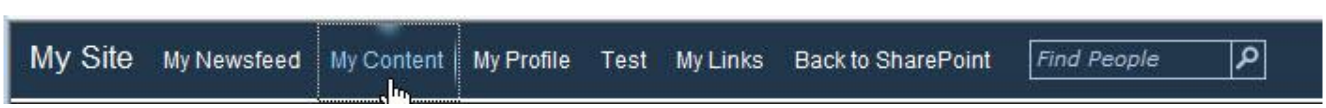
To create a My Site team sub-site in integration:

1. In the upper right hand corner of any page click the link for your name.

2. Select "My site" from the dropdown menu.

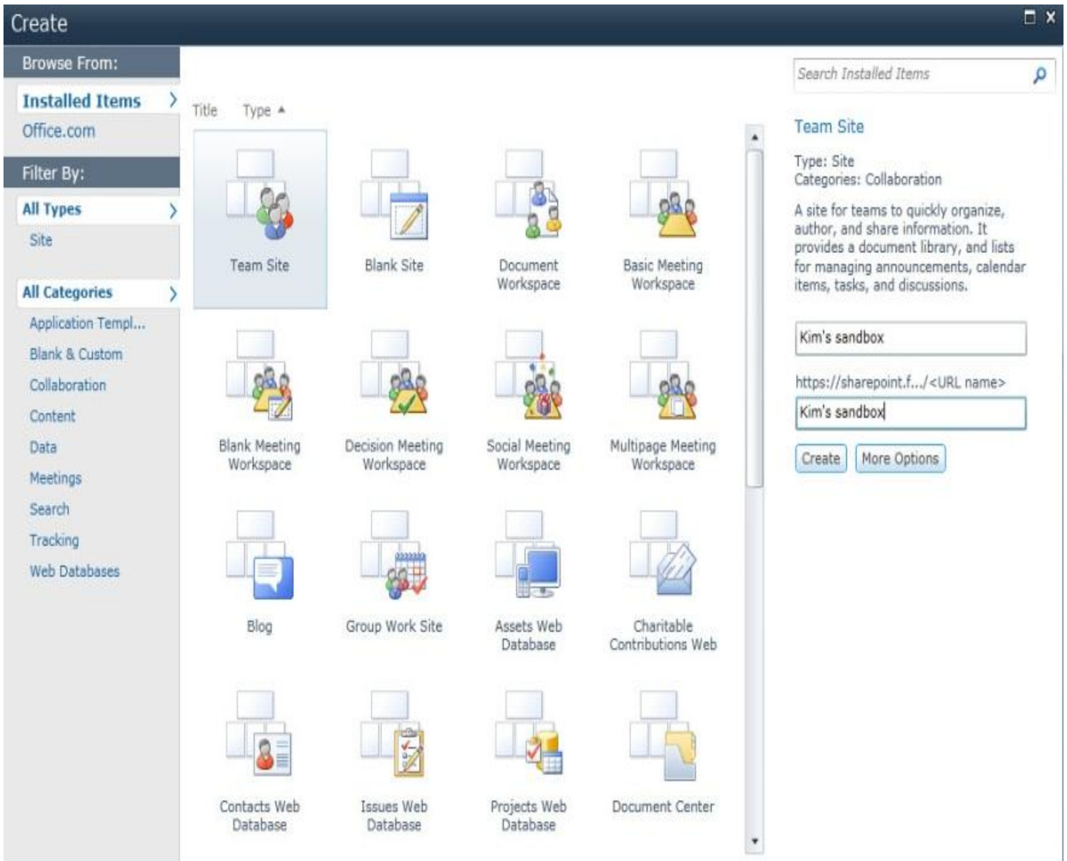


3. From the My Site page that appears' top menu, select "My Content"



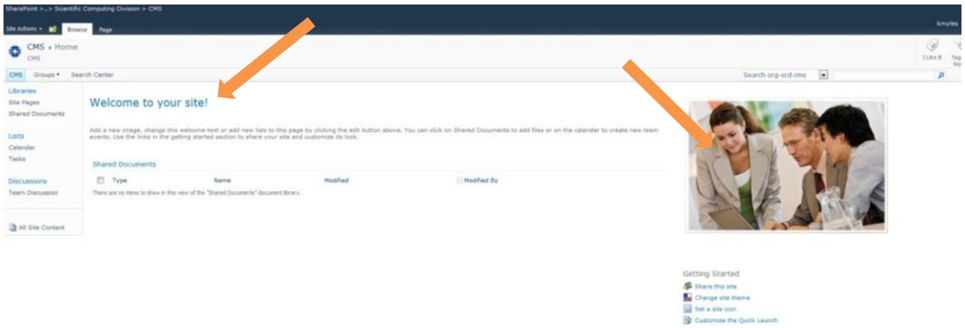
4. From the team site page that appears (with your name as title), select "Site Actions" and then "New Site".5. In the create menu that appears, select the Team Site template. 6. Add a title such as "Kim's sandbox" and name the URL (which can be the same as the title).

7. Click "Create" to create your new sandbox team site collection.



3.2 Edit your team site

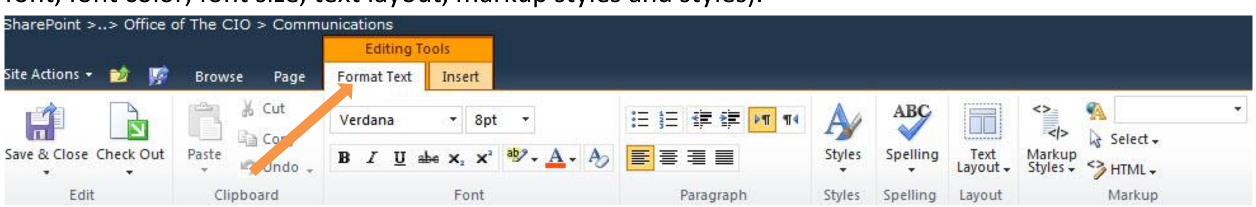
As site owner, you can change the title and default image on the landing page to make it easier to identify your site with your department, group or organization.



To edit a page title:

1) To edit a page, select the paper and pencil icon from the top menu to enter edit mode. (You can also select the page tab and the "Edit" button from the ribbon).

2) Select the "Format Text" tab from the "Editing Tools" menu to access editing options (including font, font color, font size, text layout, markup styles and styles).



3) Click the Save icon from the top menu or the Save & Close icon from the ribbon to save changes.

To edit a site image:

2) From the Insert tab, you can add a picture to your page, a table, link, list or Web Part. (See the SharePoint End User guide Sec. 6.3 for more on working with Web Parts)

NOTE: Please do not cut and paste content into a wiki page from any sources outside of SharePoint. This can cause formatting issues and freeze the page. Instead, please cut and paste content into a text editor such as Notepad for Windows or TextEdit for Mac.

4 Working with Sub sites

Site Owners can create sub sites, which are simply sites that exist within a site collection. Sub sites normally inherit permissions and navigation structure from their parent site but they can also be managed independently of their parent site.

4.1 Site templates

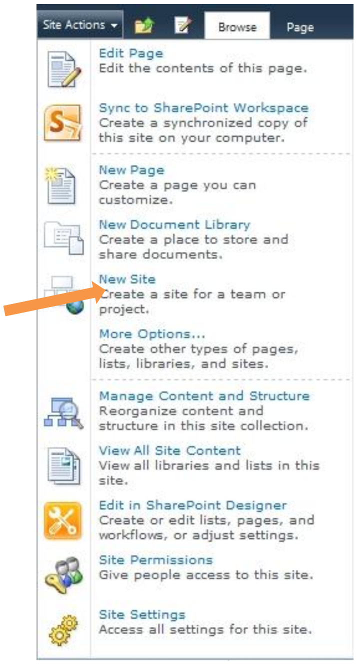
SharePoint 2010 comes with many site templates that are ready to be used out of the box.

Template Name	Description
Assets Web Database	An assets database to keep track of assets, including asset details and owners.
Basic Meeting Workspace	A site that you can use to plan, organize, and capture the results of a meeting. It provides Lists for managing the meeting's agenda, meeting attendees, and documents.
Basic Search Center	A site that provides search functionality. The site includes pages for search results and advanced searches.
Blank Meeting Workspace	A blank meeting site that you can customize to meet your requirements.
Charitable Contribution Web Database	A database to track information about fundraising campaigns, including donations, campaign-related events, and pending tasks.
Contacts Web Database	A contacts database to manage information about people that your team works with, such as customers and partners.
Decision Meeting Workspace	A site you can use to track the status of issues or make decisions at meetings. It provides Lists to create tasks, store documents, and record decisions.
Document Center	A site that can be used to centrally manage documents in your organization.
Document Workspace	A site on which colleagues can work together on a document. It provides a Document Library for storing the primary document and supporting files, a tasks List for assigning to-do items, and a links List to point to resources that are related to the document.
Enterprise Search Center	A site that provides search functionality. The Welcome page includes a search box that has two tabs, one for general searches and another for searches for information about people. You can add and customize tabs to focus on other search scopes or result types.
Enterprise Wiki	A site that can be used to publish knowledge that you capture and want to share across an enterprise. It provides an easy content-editing experience in a single location for coauthoring content, for discussions, and for managing projects.
Group Work Site	This template provides a groupware solution that teams can use to create, organize, and share information. It includes a group calendar, a circulation List, a phone call memo List, a

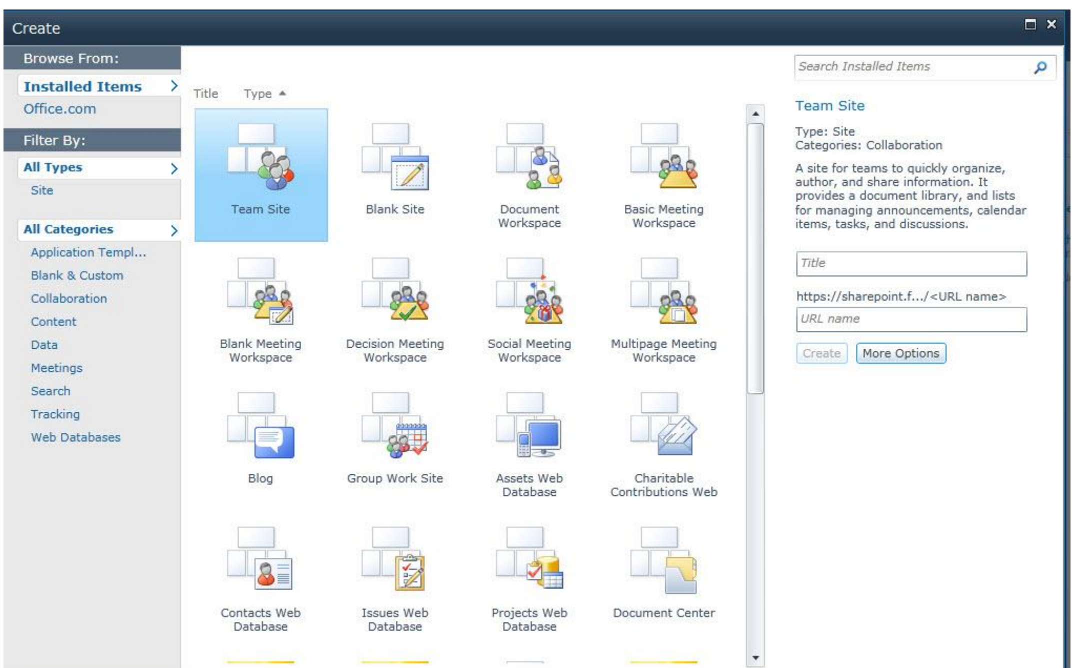
	Document Library, and the other basic Lists.
Issues Web Database	An issue database to manage a set of issues or problems. You can assign, prioritize, and follow the progress of issues from start to finish.
Microsoft Project Site	A site that supports team collaboration on projects. This site includes project documents, project issues, project risks, and project deliverables Lists that can be linked to tasks in Microsoft Project Server 2010.
Multipage Meeting Workspace	A site on which you can plan a meeting and capture the meeting's decisions and other results. It provides Lists for managing the agenda and meeting attendees. It also provides two blank pages that you can customize based on your requirements.
Projects Web Database	A project tracking database to track multiple projects and assign tasks to different people.
Publishing Site	A blank site for expanding your Web site and quickly publishing Web pages. Contributors can work on draft versions of pages and publish them to make them visible to readers. This site includes document and image libraries for storing Web publishing assets.
Publishing Site with Workflow	A site for publishing Web pages on a schedule by using approval workflows. It includes document and image libraries for storing Web publishing assets. By default, only sites based on this template can be created under this site. This template is available only at the site level when the Publishing Portal template is used to create the top-level site.
Records Center	A site that is designed for records management. Records managers can configure the routing table to direct incoming files to specific locations. The site also enables you to manage whether records can be deleted or modified after they are added to the repository.
Social Meeting Workspace	A site on which you can plan social occasions. It provides Lists for tracking attendees, providing directions, and storing pictures of the event.
Team Site	A site on which a team can organize, author, and share information. It provides a Document Library and Lists for managing announcements, calendar items, tasks, and discussions.
Visio Process Repository	A site on which teams can view, share, and store Microsoft Visio process diagrams. It provides a versioned Document Library for storing process diagrams and Lists for managing announcements, tasks, and review discussions.

4.2 Create a new site

1) Click "New Site" on the "Site Actions" menu.



2) Under All Categories, select the "team site" site template.

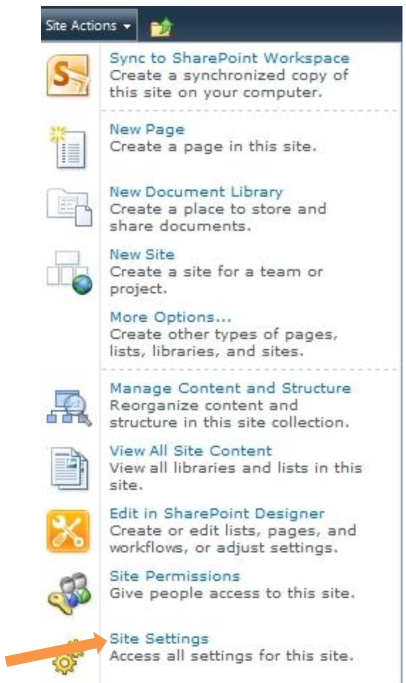


3) Enter a title for the site. (For training class, please add your last name plus team site i.e. “Myles team site”.
4) Enter a URL name for the site.(For training class, please add your last name i.e. “Myles”).
5) Click “Create”.

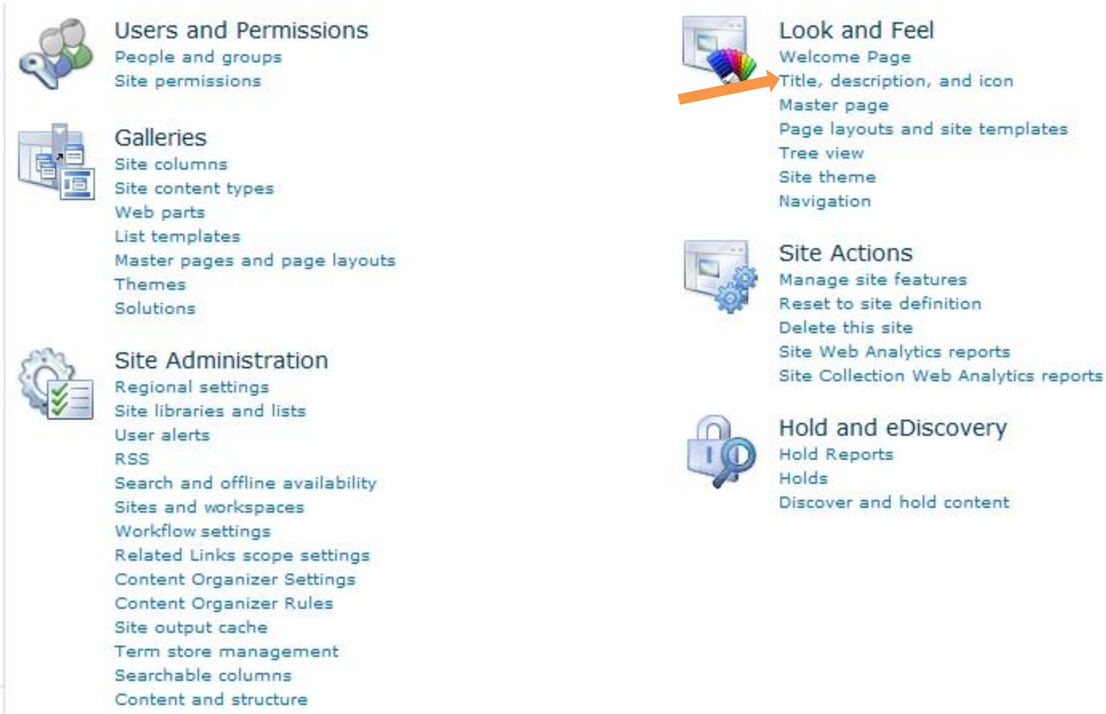
NOTE: Sub sites are automatically added to the top navigation.

4.3 Change the name, description, or URL of a site

1) Click “Site Settings” on the “Site Action” menu.



2) Click “Title, Description, And Icon” in the “Look And Feel” group.

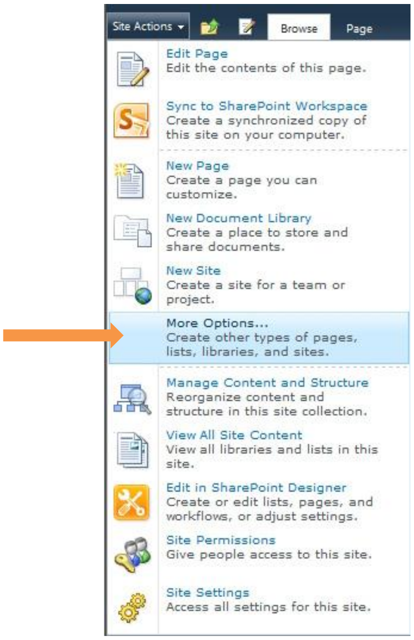


3) Change the title.
4) Change the description.
5) Click “OK”.

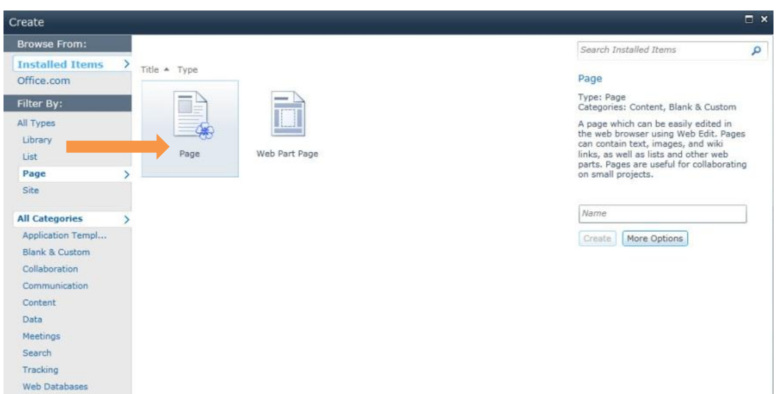
5 Working with Pages

5.1 Create a new page

1) Click the “Site Actions” menu and select “More Options…”



3) On the quick launch menu, click the “page” link under the “Filter By” category.



4) Type a name for your page in the Name field.
5) Click “Create” to publish.

6 Managing Security

Site Owners are responsible for managing the security settings for their site. This includes granting or restricting permissions.

Default Settings

When a new site collection is created, by default, the following permissions are granted by the SharePoint Services administrator:

- Read access - anyone with a Services account and password can view the site. (Including pages, list items etc. Those with read access can also download documents).
- Inherit permissions from the parent site- by default, any sites or sub sites under the parent (root) site inherit parent site permissions.

Anonymous Access

As a Site Owner, you may wish to open up your site for public access. This would enable those that do NOT have a Services account and password the ability to view your site.

To request anonymous access for a site collection or site:

- Open a Service Desk ticket – asking that your site be made anonymously accessible.

NOTE: Once your request has been processed, SharePoint Services can assist with enabling the appropriate permissions for your anonymously accessible site.

6.1 Permission levels.

Team sites are set up automatically with nine permission levels available:

- **Full Control:** Allows total control of a site. User can add, delete, approve, move and create new sites.
- **Design:** User can view, add, delete, update, approve, and customize a SharePoint site.
- **Manage Hierarchy:** User can create sites and edit pages, List items, and documents.
- **Approve:** User can edit and approve pages, List items, and documents.
- **Contribute:** User can view, add, update, and delete List items and documents.
- **Read:** User can view pages and List items and download documents.
- **Restricted Read:** User can view pages and documents, but cannot view historical versions or user permissions.
- **Limited Access:** Users at this level can view specific Lists and document libraries when given access.
- **View Only:** Similar to the Read permission level, but users at this level cannot download items.

6.2 Security groups

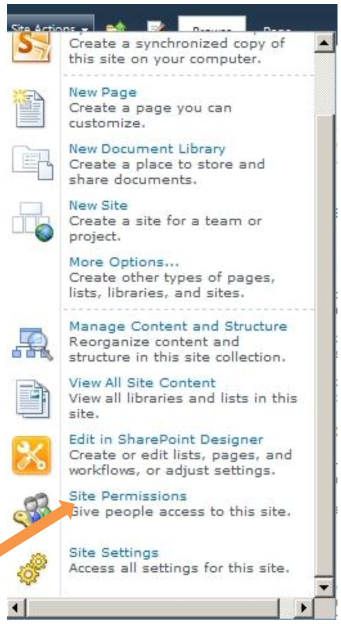
Team sites are setup automatically with three security groups available:

- **Site Members**: Given “Contribute” permission.
- **Site Owners**: Given “Full Control” permission.
- **Site Visitors**: Given “Read” permission.

Note: Additional groups may be created. Remember that groups are only containers of users; groups need to be given a permission level to be useful.

6.3 Creating groups

1) Click "Site Permissions" on the "Site Actions" menu.



2) Click "Create Groups" on the "Permission Tools" Edit tab.

3) Enter a name for the group.

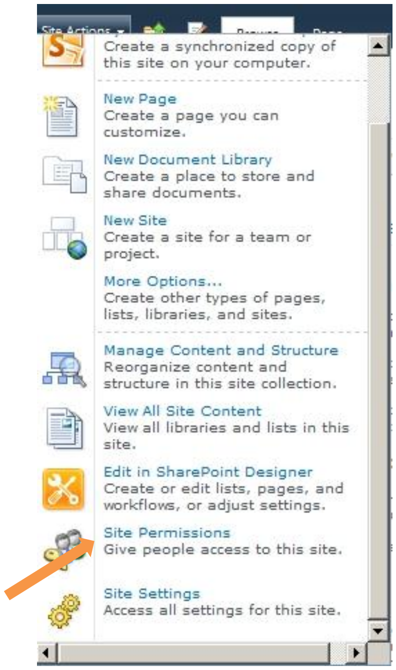
4) Enter a description for the group.

5) Choose a permission level for the group.

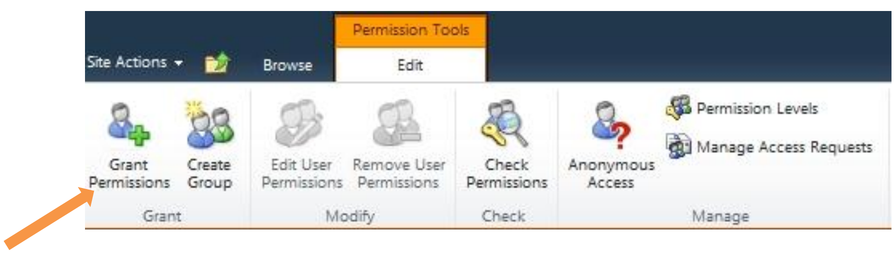
6) Click "OK".

6.4 Add people to groups

1) Click “Site Permissions” on the “Site Actions” menu.



2) Click “Grant Permissions” on the “Permission Tools” Edit tab.



3) Under Select Users, type the person’s user name or email address in the Users/Groups box and then press “Enter”.

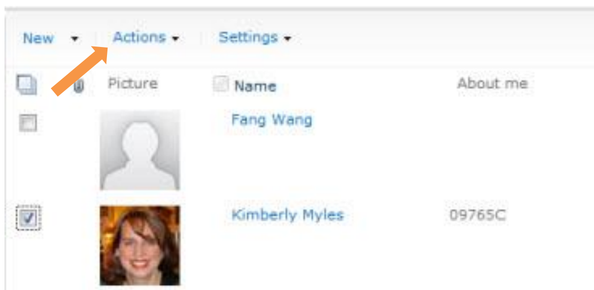
4) Under “Grant Permissions”, use the drop-down List to select the group that you want to add the person to.

5) Click “OK”.

6.5 Remove people from a group

1) Click “Site Permissions” on the “Site Actions” menu.
2) Select the name of the group for the person that you want to remove.

3) Check the box next to the name of the person you want to remove and click the Actions link near the top of the page and select “Remove Users from Group”.



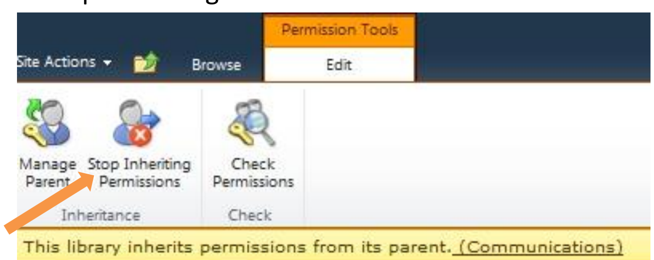
Note: If you do not have permission to view a document, list or site, then it will not appear in searches for you.

6.6 Breaking inheritance

By default, child objects (sites, lists, and libraries) inherit their permissions from their parent object. For example, a Library inherits the permissions of the Site it's created in, and a document inherits the permissions of the Library it's uploaded to. By default, a sub-site inherits site permission from the top level (parent) site. If an object inherits permissions, you need to stop inheritance before you can change the object's permissions.

1) Select the List or Library you want to work with.
2) Under "Library Tools" on the Ribbon, select the "Library" tab.
3) Click "Library Permissions".

4) Click "Stop Inheriting Permissions".

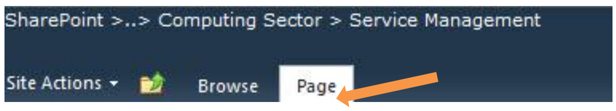


7 Working with Alerts

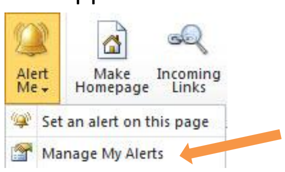
As a Site Owner, you can subscribe other users to an alert. (The SharePoint End user manual covers alerts in chapter 4.7) This can be useful if you would like to alert subject matter experts to changes to your site, a particular list, library, document or presentation. This can be especially useful if you want a user to receive email-based alerts when a document is updated in SharePoint.

7.1 To add, view or edit alerts (for other users):

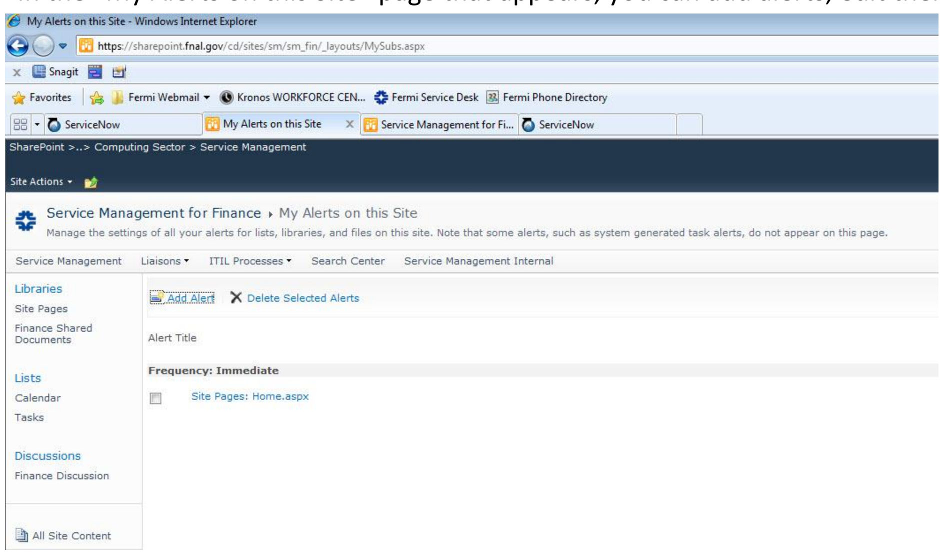
1. Click the "Page" tab on the top menu from the site where you want to manage alerts.



2. Click the Alert me icon and select the “Manage My Alerts” option from the drop down menu that appears.



3. In the “My Alerts on this Site” page that appears, you can add alerts, edit them or delete them.

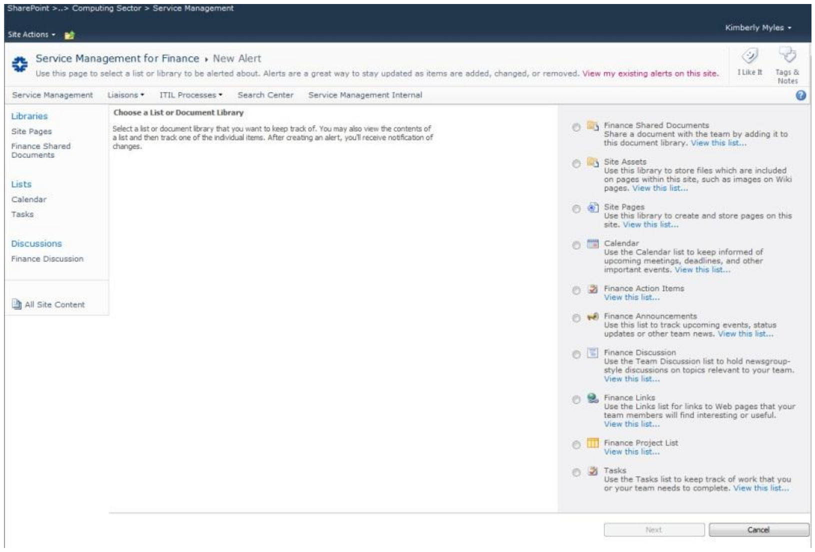


7.2 To delete an alert:

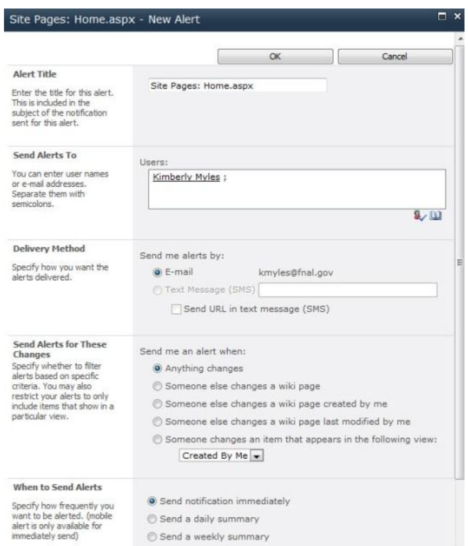
1. Check the box in front of the alert you want to delete and click “Delete Selected Alerts”.

To add an alert:

1. Click the “Add Alert” link.
2. In the “New Alert” page that appears, select the list, document library or page that you want to receive alerts for and select “Next”.



3. In the "New Alert" form that appears, fill out the fields according to your preferences and click “OK”.



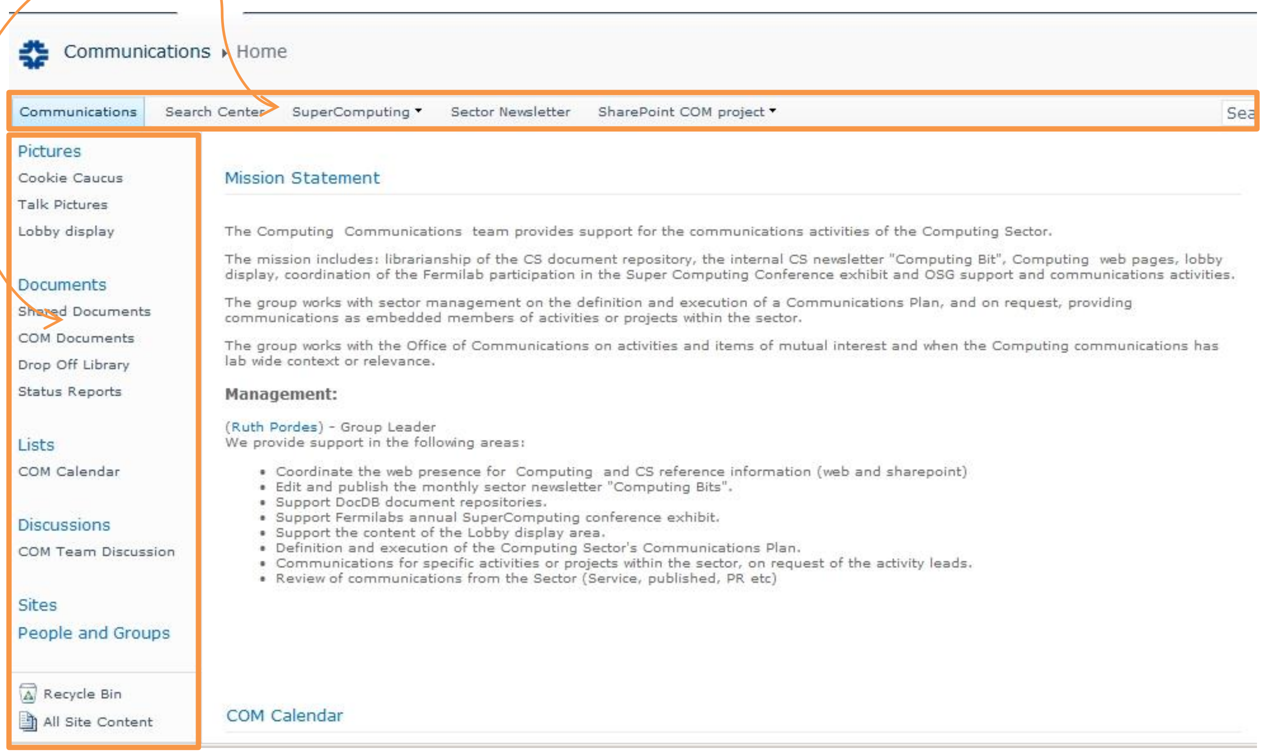
7.3 To view alerts:

1. Click “Site Actions” and then “Site Settings”.
2. In the “Site Administration” area click “User alerts”.
3. Select the person whose alerts you want to view from the list next to “Display alerts for”.
4. Make any desired changes and click the “Update” button.

8 Managing navigation

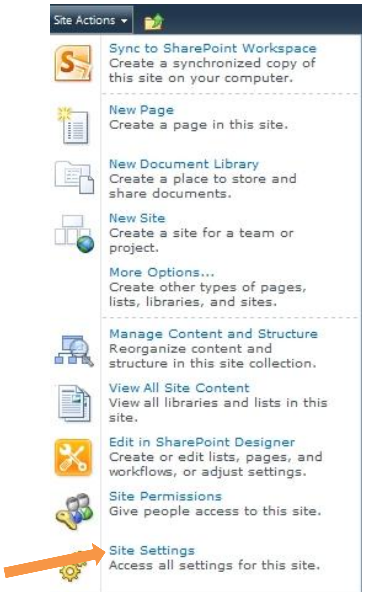
Within each site and site collection, you have the ability to control the navigation. Navigation includes two regions on the page:

- The top navigation menu: Global navigation area
- The left navigation menu: Current navigation area

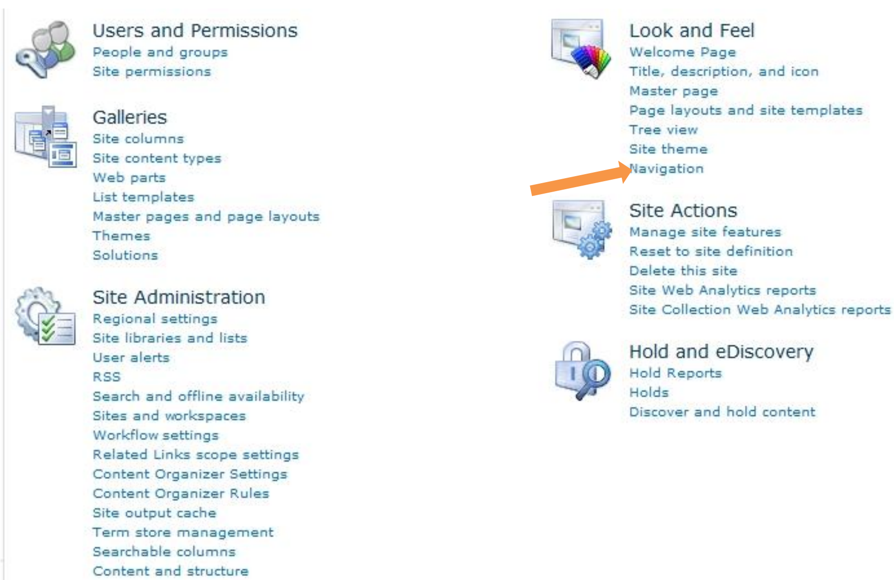


8.1 Modify the left navigation bar

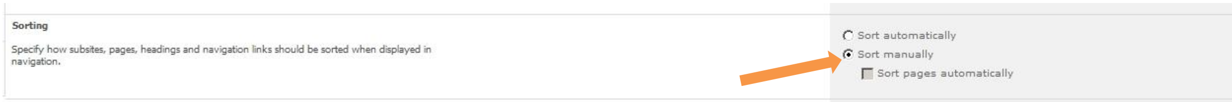
1) Click “Site Settings” on the “Site Action” menu.



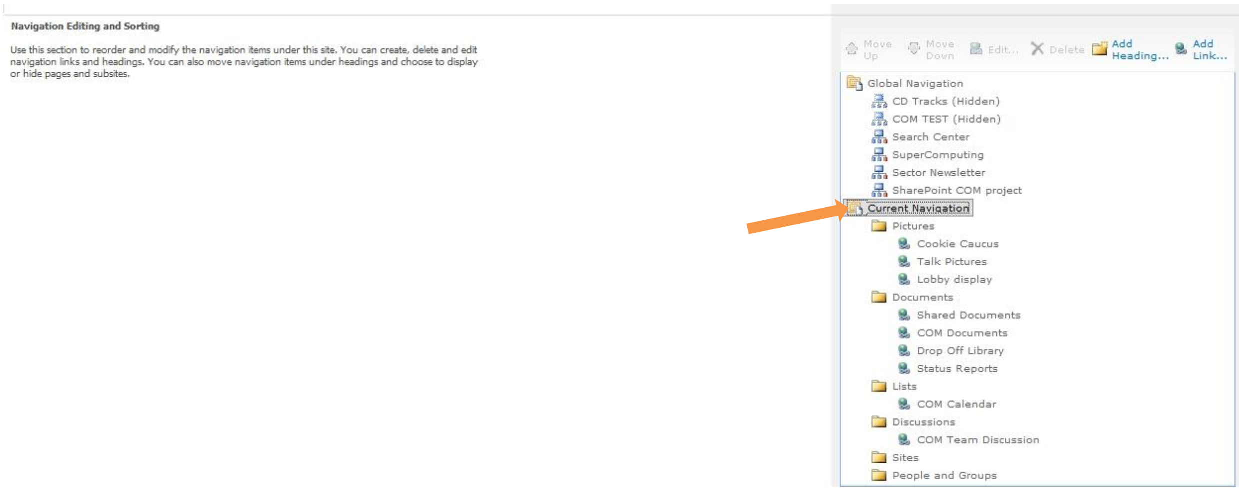
2) Click “Navigation” in the “Look And Feel” group.



3) In the “Sorting” section, select the “Sort manually” option.



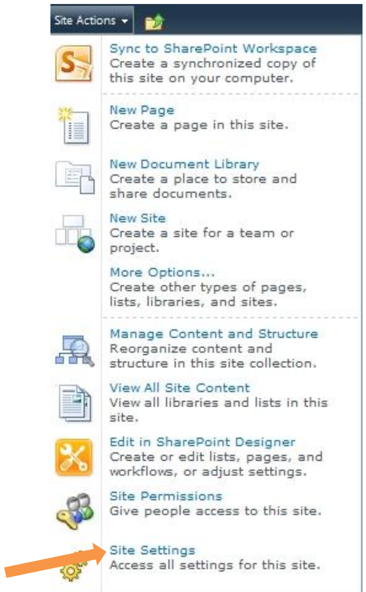
4) In the navigation Editing and Sorting section, select the Current Navigation folder then click “Add Heading…” or “Add Link…”



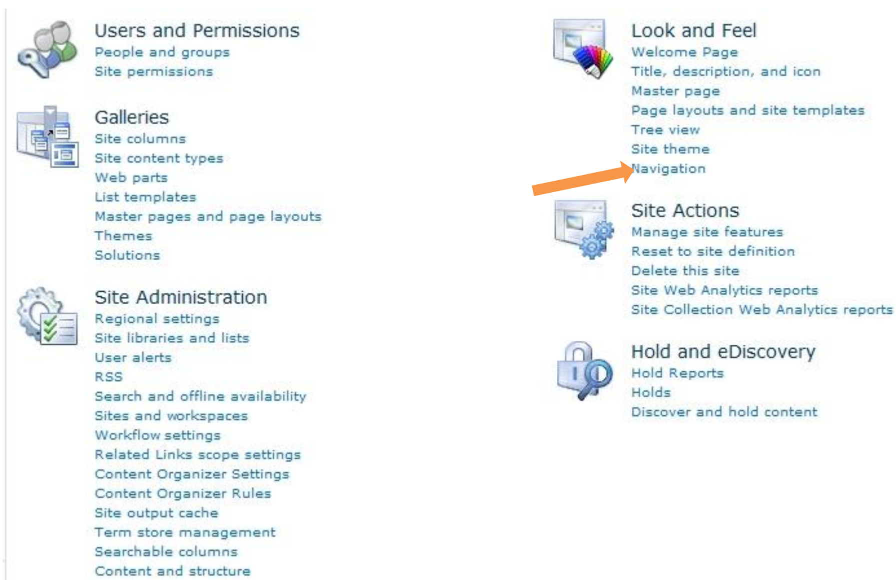
5) Add the pertinent information.
6) Click “OK”.
7) Click the new heading or link to select it. Then click “Move Up” or “Move Down” until the menu item is listed in the order you desire.
8) Click “OK”.

8.2 Modify the top navigation bar

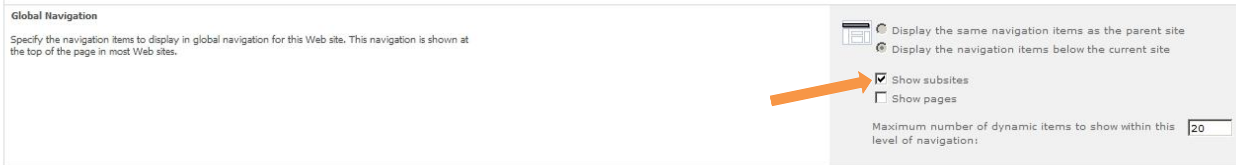
1) Click “Site Settings” on the “Site Action” menu.



2) Click “Navigation” in the “Look And Feel” group.



3) In the Global Navigation section, select the option to show sub-sites.



4) In the navigation Editing and Sorting section, select the Global Navigation folder.

5) If you want, you can add a heading or link or hide a site.

9 Working with Document Libraries

9.1 About Document Libraries

A Document Library is a special kind of List (find out more about Lists in Section 3). Document Libraries allow you to manage files such as documents, spreadsheets, and presentations.

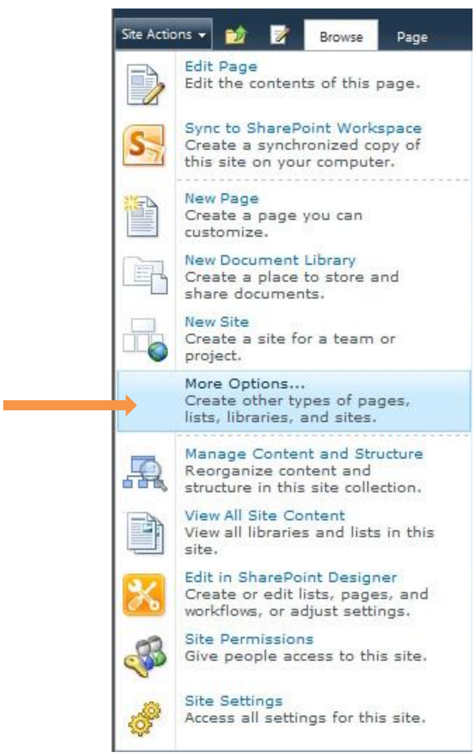
A SharePoint site can contain many Document Libraries, and each Document Library can contain a hierarchy of folders and files.

Keep in mind that it is generally not recommended to have too many layers of folders and sub-folders within a Document Library. For ease of navigation, create multiple Document Libraries instead.

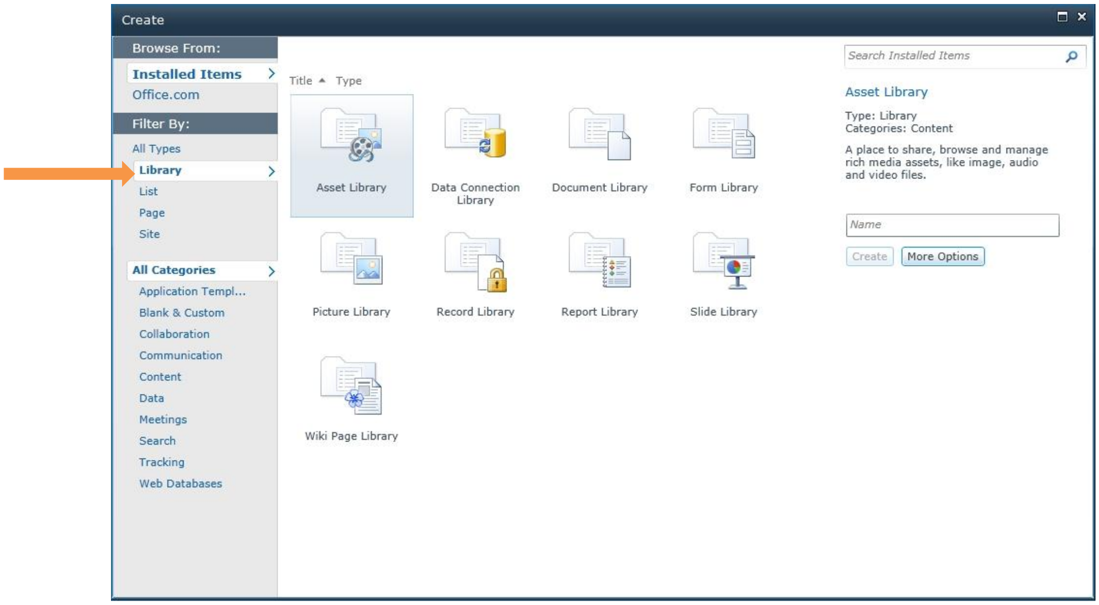
Note: Each team site comes with a default Document Library named “Shared Documents”. You can create your own Document Libraries as you like.

9.2 Create a Document Library

1) Click “More Options…” on the “Site Actions” menu.

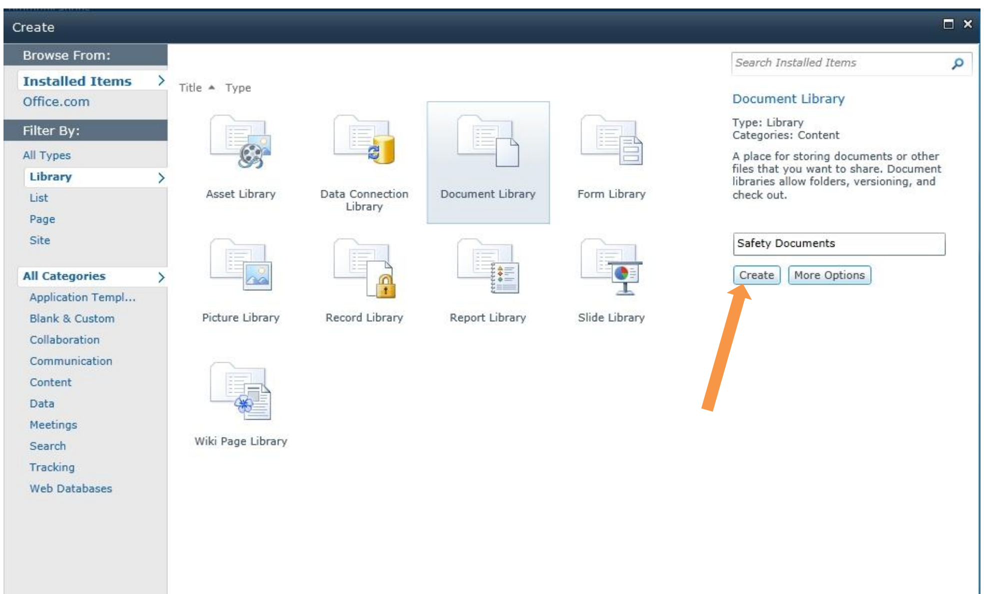


2) Choose “Library” from the “Filter By:” menu.



3) Select "Document Library".

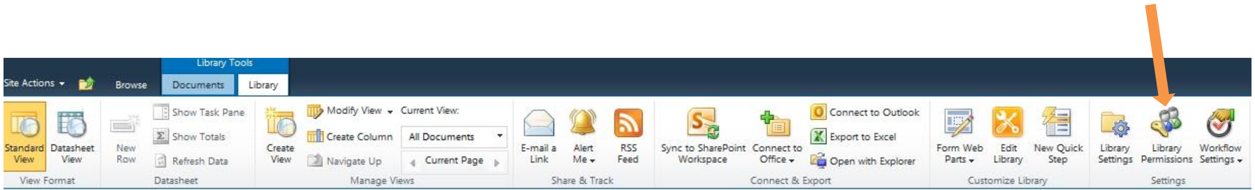
4) Enter a name for the Document Library and then click "Create".



Note: Your new document library will automatically appear as an option on the left menu in the 'Library' area.

9.3 Grant access to a Library

1) Select the library you want to work with.
2) Under "Library Tools" on the Ribbon, select the "Library" tab.
3) Click "Library Permissions".



4) Click “Grant Permissions”.
5) Type the person’s name in the Users/Group box.
6) Specify whether to add the user to a group or to grant permissions directly.
7) Click “OK”.

10 Working with Lists

SharePoint 2010 provides many kinds of Lists that you can use to track information. A List is similar to an Excel spreadsheet or a table in a database.

In a List, data is gathered in rows, and each row is known as a List Item. A List can have multiple columns. A List Item is a row with data in those columns.

For example, a List of Fermilab contacts may have the following columns:

- First Name
- Last name
- Fermilab ID
- Organization
- Email
- Phone

SharePoint provides three basic kinds of Lists:

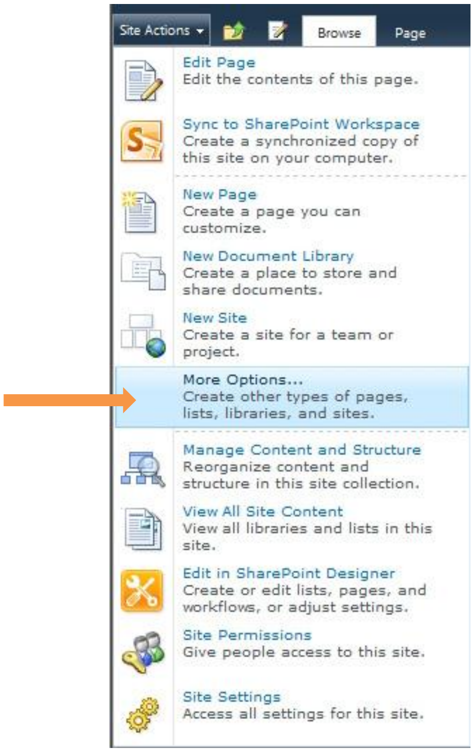
- **Communication Lists** are used to track announcements, contacts, and discussion boards.
- **Tracking Lists** are used to track information such as links, calendars, tasks, issues, and surveys.
- **Custom Lists** provide a starting template that you can build on to create a List with the exact columns you need.

10.1 List types

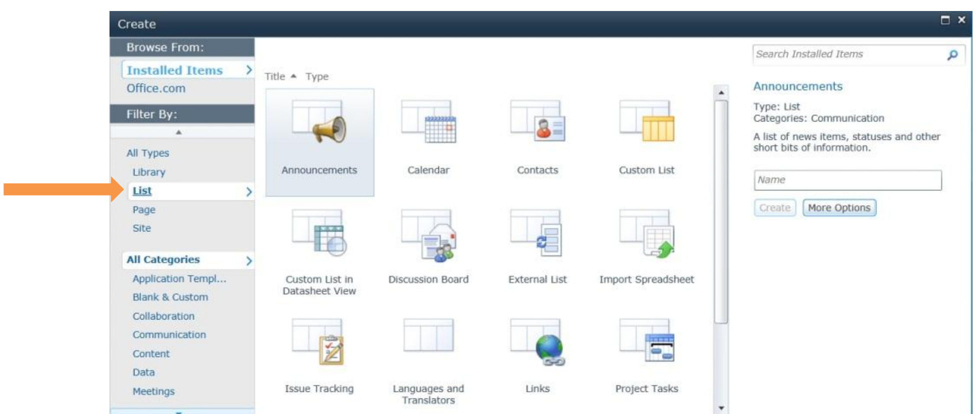
Types of List	When to use it	What makes it special
Announcements	To display brief announcements on your site's home page	You can enter expiration dates for announcements
Contacts	To track contacts, especially if you want to use Outlook for data entry	You can remove columns that you don't need
Discussion boards	To create a discussion forum where people can post messages and reply to them	
Links	To track hyperlinks	Uses a hyperlink column that automatically formats entered text as HTML anchor links
Calendar	To track calendar items	Can synchronize with Outlook and knows how to handle recurring events
Tasks	To track tasks	Can synchronize with Outlook; Task Lists can be grouped with summary tasks
Project tasks	To track work items for a project.	Can display as a Gantt chart
Issue Tracking	To track trouble tickets.	Works well with issues that have three states – open, closed, and resolved
Survey	To take a poll	Allows you to create a set of questions that users must walk through
Custom	To create a List with columns that you define.	Allows you to create a List specific to your content and can for example act on certain content in special ways
KPI (Key Performance Indicator)	To display graphical status indicators.	Allows you evaluate selected business data against specified goals and display that information in various formats such as scorecards and dashboards
Import Spreadsheet	To create a List based on an existing spreadsheet.	Allows you use an existing Excel spreadsheet as the basis of the List; can help avoid rework and repeated effort entering data
External	To create a List based on a data source outside SharePoint.	Allows you display data from other non-SharePoint databases or Web services

10.2 Create a new List

1) In your SharePoint site, choose “Site Actions -> More Options…”



2) On the Create page, click the “List” link in the “Filter By” section.



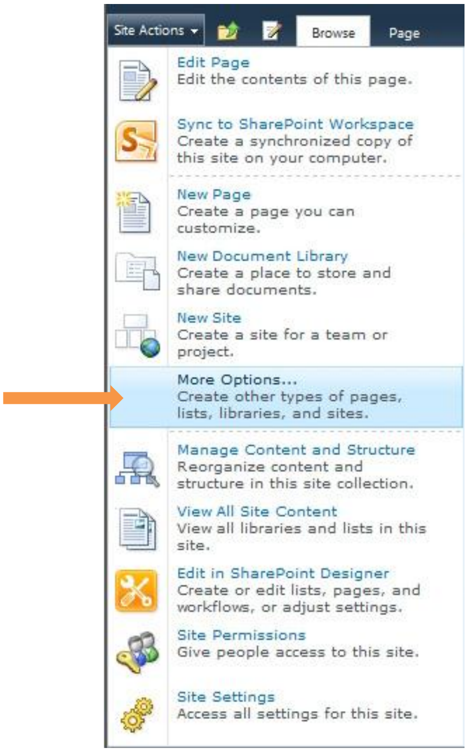
3) Click the icon for the kind of List you want to create.

4) Type a name for your List in the text box that appears.

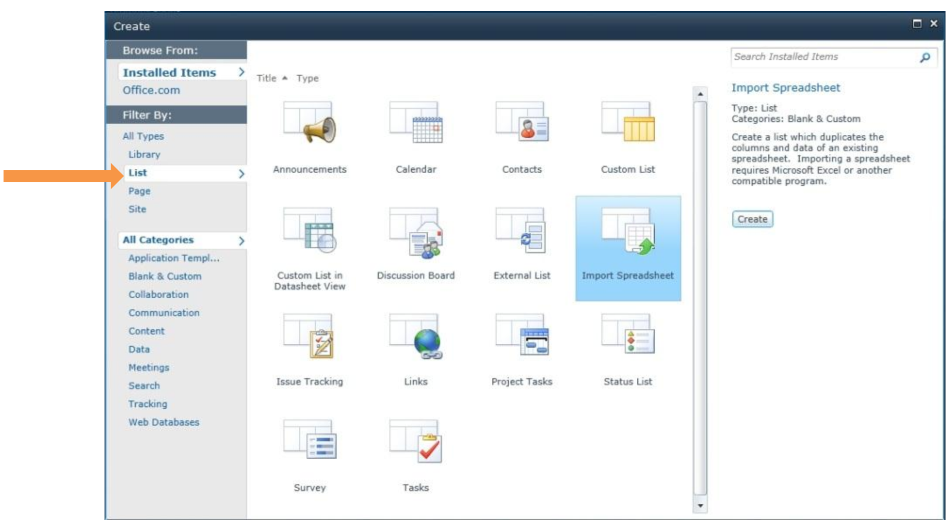
5) Click the “Create” button.

10.3 Import a spreadsheet to create a List

1) Click the “Site Actions” menu and select “More Options…”

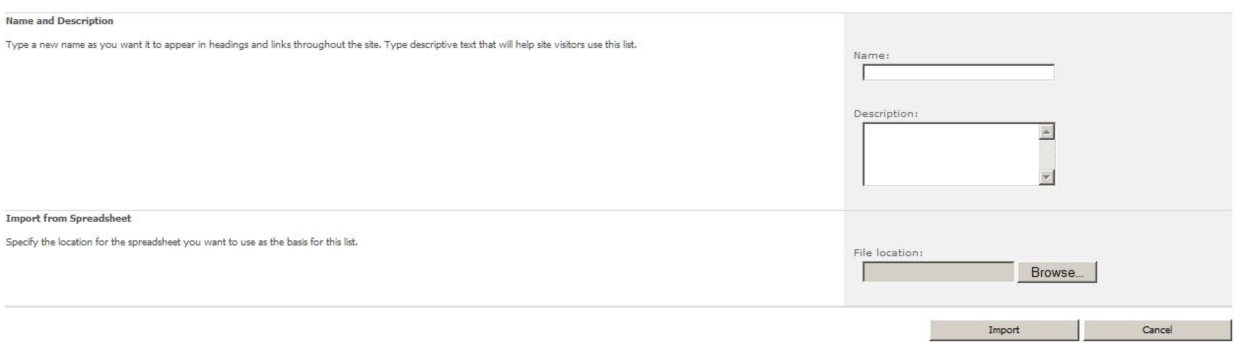


2) On the Create page, click the “List” link in the “Filter By” section.



3) Click the “Import Spreadsheet” icon, and then click “Create”.

4) Fill out the Name and Description field. Then click “Browse” in the “Import from Spreadsheet” section.



5) Select the spreadsheet to import, then click “Open”.

6) Click “Import”.

10.4 Use the Ribbon to manage Lists

All SharePoint Lists display the Ribbon at the top of the List. You can use the Ribbon to access the common tasks used for working with Lists.

The menu commands you see in the Ribbon depend on the kind of List you are viewing. Usually the Ribbon displays List commands in one of two tabs:

- **Items:** displays all the commands you need for working with items.

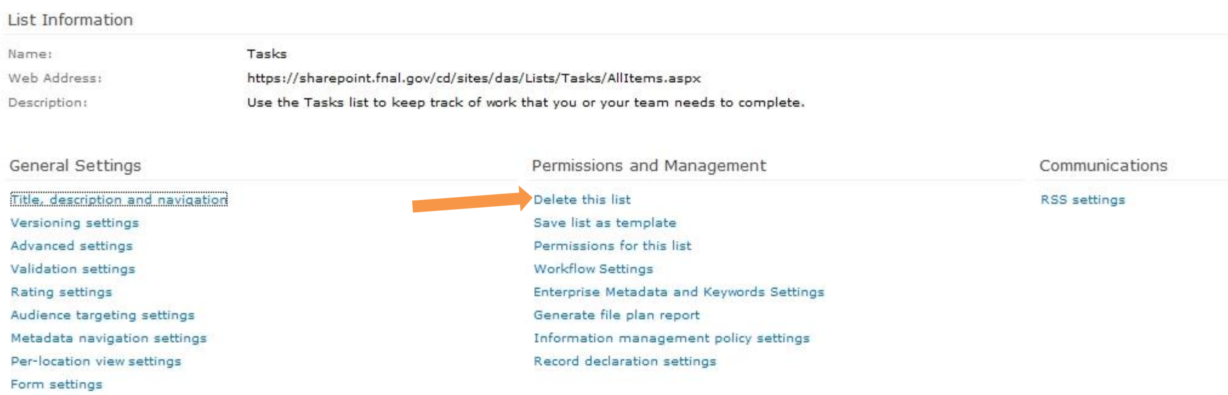
- **List:** displays commands for managing and customizing the entire List, such as creating views and exporting the List to Excel.

10.5 Delete a List

1) Select the List you want to delete.

2) Click "List Settings" on the "List" tab.

3) Click "Delete This List".



4) Click "OK".